Shared Service Center Stakeholder Meeting

Tuesday, November 6, 2018

Attendees: Martina Buckley, Sasha Hudson, Rebecca Struckmeier, Tim Kuonen, Linda Rothfus, David Sohnes, Sharon Doherty-Ritter, Kevin Joseph, Jamie Jung, Gina Fischer, Dusti Koetke, Michael Palmer, Kathy Suess, Eva Dominguez, Joe Kirby, Stacy Long, Vania Cruz, Margo Young, Amy Rynes, Lisa Drouillard, Jane Henderson, Aimee Howell, JoAnna Napoli

Business Process Enhancements/Consistent Applications

* Agreed that OSP and Procurement need to be represented at future meetings
* Dual routing in Kuali has started (Gina)
* E-travel – IT working on making updates to some issues that occurred, once complete will borrow process for travel reimbursement (Sasha)
* Early stages of reimbursement process, small group gave feedback, not ready to contact faculty for feedback (Linda)
* No way to view e-travel approval history- would be helpful to view (Eva)
* Just completed recent update e-travel, you are now able to view approval history (Tim)
* Rebecca and Tim will work on instructions for users to view e-travel history
* Waiting to roll out docusign with expense reimbursement- COEIT using RT ticket system to collect data once approved entered into docusign, eliminates sending docusign back for lack of correct information (Joe)
* User concerns with RT system for docusign expense reimbursement process, a number of departments not RT savvy and prefer everything in one system (Linda)
* Hold on expense reimbursement process enhancement roll-out in PS 9.2 because we do not own the expense reimbursement module and IT has to build (Stacy)
* Need to review process for electronic expense reimbursement approvals, business manager should be involved to confirm funding, which accts, if grants funding available (Gina)
* Consider whether we need chair approval of travel reimbursement since chairs are reviewing to approve time of travel, and budget availability which is reviewed when e-travel is approved.

– May need business manager to review and approve travel reimbursement and chair approve e-travel.

* Plan to start expense reimbursement development in PeopleSoft in January
* Consider that maybe e-travel and reimbursement should be viewed as one process versus two separate
* Starting a work group focusing on E-Travel and Reimbursement standardized process
  + Compare departmental current processes, find overlap and build standardized process
  + Committee members- Stacy, Eva, Michael, Gina, Linda, Jacinta, Dusti, Kathy, Grants representative, Enrollment Management representative, Tim

Metrics/Dashboard

* Need to collect standard metrics
* Plan to define 5-10 dashboards to track, monitor and report
* Check with Jacinta, thought she presented on metrics at previous Town Hall, possible just a query related to volume
* Questions to consider, What is important? What data is available?
* Start list of wants and check system to see what REX reports are available
* Look at value of time benchmark
* Look at Acct transaction activity for established center verses one just starting
* Would survey help to know where each SSC is in the development process?
* Next step, Sasha and Martina will work on survey with Michael to send to each SSC (AAOU, CNMS, Student Affairs, COEIT, DPS, CAHS, OCAM (VP of Research), MIPAR (CAHS)
* Metrics Workgroup – Rebecca, Eva, Martina, Michael, Lisa, Stacy, JoAnna & Kevin

Communication Channels

* Do we need better communication channels?
* Currently myUMBC group page, just used currently for Town Hall notes
* Should we have a website?
* Consider main website with link to each SSC individual website
* COEIT SSC working on website, who they are, what they do, RT tickets, hooks to COEIT website (Michael)
* AAOU SSC working on similar website with quarterly newsletter (Martina)
* Who is the main target viewer of the website? SSC staff, other faculty and staff, students
* Need to define before website set up
* Initial thoughts, bring together documents and processes
* Sasha will send email with link to examples of other campus SSC websites for meeting member review

Next Steps

* Lead person for each sub category of meeting
  + Communication- Sasha Hudson
  + Metrics- Martina Buckley
  + Business Process Improvements- Linda Rothfus and Lisa Drouillard
* Meeting will occur quarterly- agenda will remain the same until current items completed
* Any other topics that need to be added email Sasha or Martina
* Sasha and Martina agreed to work with Eva on getting started with a shared services center. Will council with Jacinta/Trisha/Vania for support.